



Michael Watson
SECRETARY OF STATE

Mississippi Secretary of State

The Lobbying Online Reporting System

Client User Guide



Table of Contents

Logging in as a Client	2
Tabs	3
Lobbyist(s) Tab	4
View Lobbyist Registration Filings	4
Create an Annual Report	5
Compensation Actions	9
Expenses Actions.....	10
Import Expenses from Spreadsheet.....	11
Receptions Actions.....	15
Report Actions	16
Pending Lobbyist Tab	18
Submitted Reports Tab.....	18
My Profile Tab	20
Change Password	23

*Click on the table of contents item you want to view
to be taken directly to it*



Logging in as a Client

While you can search for reports without logging in to the Web Portal, you must log in to submit filings.

To log in to the Web Portal, you must be a registered user and your lobbyist will register you.

1. In your web browser, go to
<https://sos.ms.gov/elec/portal/msel2/page/onlineFiling/portal.aspx>
The Elections home page displays.
2. Click the [Clients](#) link on the left side of the page.
3. The *Registered Client* login screen displays.
4. Enter your Username and Password.
 - a. *Your Username and Password were emailed to you when your lobbyist registered you as a client.*
5. Click the **(Login)** button.
6. This will bring you to the *Client Portal* home screen.

Michael Watson
SECRETARY OF STATE

Elections
Home
Lobbyists
Clients
Reporting Deadlines
Report Search
Lobbying Waiver Request
Form

Client Portal
You must login to file online

Registered Client
Login in to manage Lobbyists and create/submit reports

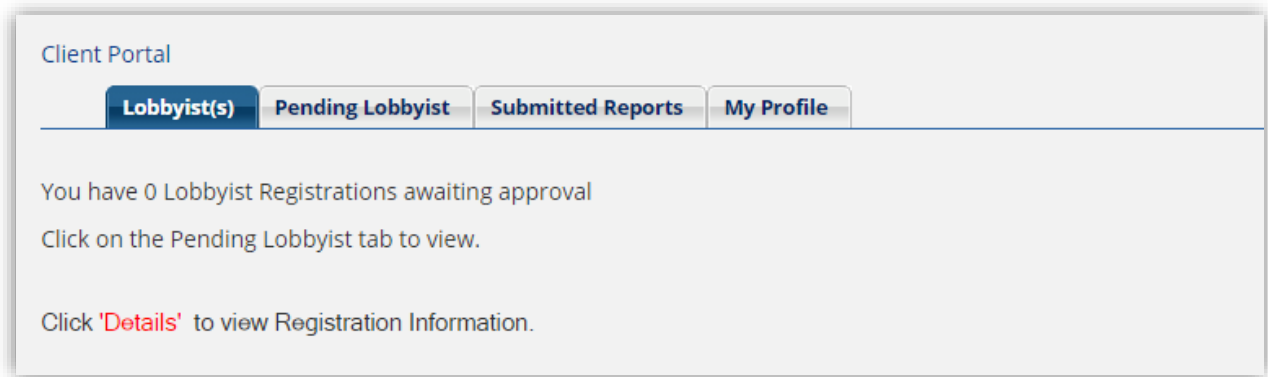
Username:

Password:



Tabs

Notice the tabs across the upper portion of the Client Portal screen.



Clicking on the tabs takes you to different parts of the site.

Here you may navigate between:

- Lobbyists
- Pending Lobbyist
- Submitted Reports
- My Profile



Lobbyist(s) Tab

The Lobbyist(s) tab is the default tab that you come to after logging in as a Client.

Lobbyist(s)Pending LobbyistSubmitted ReportsMy Profile

You have 4 Lobbyist Registrations awaiting approval
Click on the Pending Lobbyist tab to view.

Click '**Details**' to view Registration Information.

Lobbyist Registration Filings

Year **2015**

	Certificate #	Description
<input type="checkbox"/> Details	L20150005	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Test Company

[Print Preview](#)

Click '**Create Annual Report**' to Create Form C(Annual Report).
Click '**Details**' link to update the pending report.
To Delete a pending report, select the Pending Reports you wish you terminate and click '**Delete Reports**'

New Reports

[Create Annual Report](#)

Pending Reports

Here you may view and create *Annual Reports* and view your *Lobbyist's Registration Filings*.

View Lobbyist Registration Filings

1. Choose a year from the dropdown menu to display that years filing.



Lobbyist Registration Filings

Year **2015**

	Certificate #	Description	Effective Date	Expire Date
<input type="checkbox"/> Details	L20150005	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Test Company	01/13/2015	12/31/2015

[Print Preview](#)

- Click the [Details](#) Link to go to a screen that shows lobbyist and client Registration Information.

Registration Info

Lobbyist Information

Lobbyist Name : **Lamb, Sarah**

Email :

Client Information

Client Name : **Example Company**

Contact Name : John Smith

Telephone 1 : (123)456-7890

Email : slamb@dorgersoft.com

Physical Address

123 Mainstreet
Jackson, MS 39206

Mailing Address

123 Mainstreet
Jackson, MS 39206

Client Actions

[Open Certificate](#)

- At the bottom of that screen you will see a Client Actions Box. In the Client Actions box click on the **(Open Certificate)** button to see the *Lobbyist's Registration Form*.

Create an Annual Report

- Click on the **(Create Annual Report)** button.



Click '**Create Annual Report**' to Create Form C(Annual Report).

Click '**Details**' link to update the pending report.

To Delete a pending report, select the Pending Reports you wish you terminate and click '**Delete Reports**' button.

New Reports

Create Annual Report

Pending Reports

☐ Select All

Report Type		Report Status	Date Created
<input type="checkbox"/>	Details Form C	Pending	2/7/2015 10:32:3
<input type="checkbox"/>	Details Form C	Pending	1/19/2015 3:02:2
<input type="checkbox"/>	Details Form C	Pending	1/19/2015 1:58:1
<input type="checkbox"/>	Details Form C	Pending	1/19/2015 12:46
<input type="checkbox"/>	Details Form C	Pending	1/13/2015 11:49
<input type="checkbox"/>	Details Form C	Pending	12/17/2014 1:49
<input type="checkbox"/>	Details Form C	Pending	12/16/2014 9:41
<input type="checkbox"/>	Details Form C	Pending	12/16/2014 11:5
<input type="checkbox"/>	Details Form C	Pending	9/19/2014 1:38:5
<input type="checkbox"/>	Details Form C	Pending	9/19/2014 1:36:0
<input type="checkbox"/>	Details Form C	Pending	9/19/2014 1:34:3
<input type="checkbox"/>	Details Form C	Pending	9/19/2014 1:03:1
<input type="checkbox"/>	Details Form C	Pending	3/5/2014 11:53:3
<input type="checkbox"/>	Details Form C - Amended	Pending	3/5/2014 11:52:2
<input type="checkbox"/>	Details Form C - Amended	Pending	9/26/2013 5:04:1

Delete Reports

(Here you may also continue filing Pending Reports by clicking the Details link that corresponds with the Form that you would like to continue filing. Clicking the [checkbox] that corresponds with the form will select it, if the form needs to be deleted you may then click the **(Delete Reports)** button at the bottom of the page.)

2. Click on the button that corresponds with the reporting year you wish to create a report for.



Annual Report

Select reporting year

2012

2013

2014

2015

3. The next screen will be the *Form C – Client Annual Report*.
4. At the top is the *Client Administrative Costs*.

::Client Annual Report

Client Administrative Costs

Overhead :

Reimbursement(s) To Lobbyist :

Direct Payments :

Lobbying Expenses :

Urging Others To Communicate (advertising, direct mail, etc.) :

Food and Beverage, Travel, Lodging and Entertainment. DO NOT include Receptions :

Gifts, loans, honorariums, Any other thing of Value :

Add/Edit Admin Costs

5. To edit or add to these costs click the **(Add/Edit Admin Costs)** button.
6. This will take you to a *Client Administrative Cost* form.



Overhead <input type="text"/>	Reimbursement(s) To Lobbyist <input type="text"/>
Direct Payments <input type="text"/>	Lobbying Expenses <input type="text"/>
Urging Others To Communicate (advertising, direct mail, etc.) <input type="text"/>	Food and Beverage, Travel, Lodging and Entertainment. DO NOT include Receptions <input type="text"/>
Gifts, loans, honorariums, Any other thing of Value <input type="text"/>	Fill out the <i>Client Administrative Cost</i> form and click the (Next) button.
<input type="button" value="Cancel"/> <input type="button" value="Next"/>	

7. After you click **(Next)** the *Form C – Client Annual Report* screen comes back with your changes added to the *Client Administrative Costs* section.



Compensation Actions

Here you may Add Compensation, Edit Compensations, and Delete Compensations.

1. Click the **(Add Compensation)** button.
2. Next a *Client Lobbyist Compensations* form will appear.

Fill out the form and click
the (Next) button.

3. Next you will be brought back to the *Form C – Client Annual Report* screen with your new Compensation added.



Compensation Items

☐ Select All

LobbyistName	Certificate Number	Early Termination Date	Compensations
<input type="checkbox"/> Mary Poppins	12	Feb 10 2015	\$1230

☐ Select All

Total Compensations \$1230
Compensations Count 1

Edit Compensations Delete Compensations

4. If the information in a compensation item is incorrect, you may make corrections. Click the [checkbox] that corresponds with the compensation you need to edit and click the **(Edit Compensation)** button to go back to the *Client Lobbyist Compensations* form.
5. To delete a compensation click the [checkbox] that corresponds with the compensation item you need to delete and click the **(Delete Compensations)** button.

Expenses Actions

Here you may either add expenses directly or Import Expenses from Spreadsheet. In order to import expenses from spreadsheet you will need to have the *Lobbyist Expense Template* downloaded from the Lobbyists tab.

Expenses Actions


Add Expenses Import Expenses From Spreadsheet Download Lobbyist Expense Template

Expense Items

1. To add expenses manually click the **(Add Expenses)** button to be taken to a *Lobbying Expenditure* screen.



Recipient

Date
 

Provider

Item Description

Recipient's Office Title
Governor ▼


Place

Expense Type
Award ▼

Value/Cost


Cancel **Next**

Type the recipient's name in the Recipient box and choose the Recipient's Office Title from the dropdown menu.

Date
08/01/2014 

August 2014

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Type the date into the Date box or click on the  calendar button to bring up a calendar and select a date.

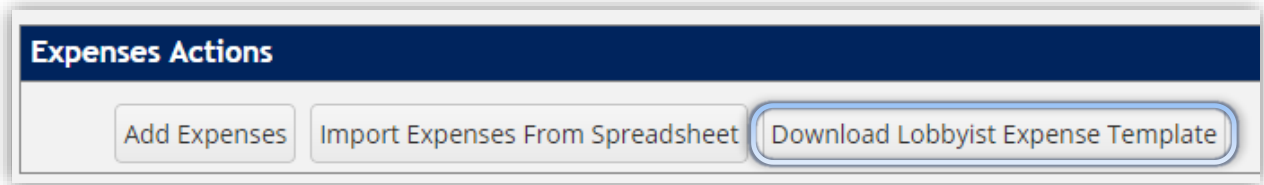
- When all of the required fields are filled out click the **(Next)** button to be taken back to the *Form C – Client Annual Report* screen.

Import Expenses from Spreadsheet

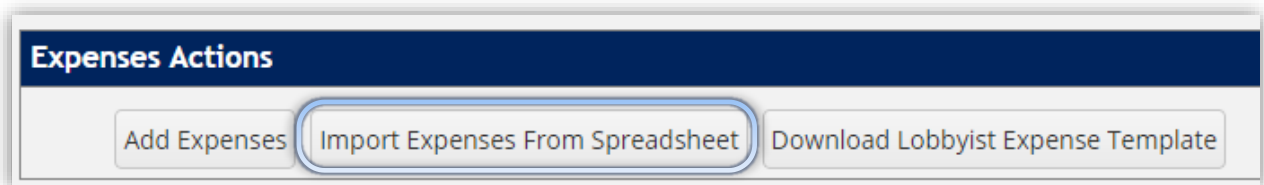
To upload expenses using a spreadsheet you will need to download and use the Lobbyist Expense Template.



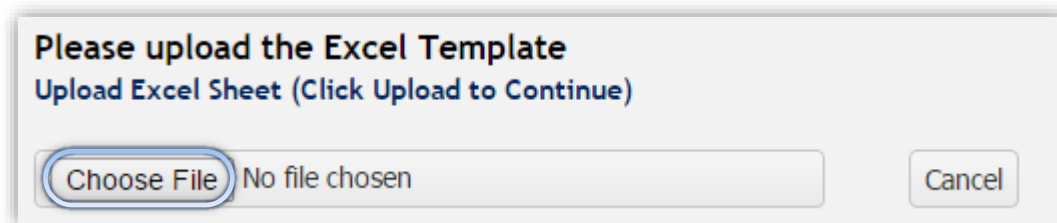
1. First you will need to have the Lobbyist Expenses Template downloaded. The Lobbyist Expenses Template may be downloaded from the Expenses Actions.



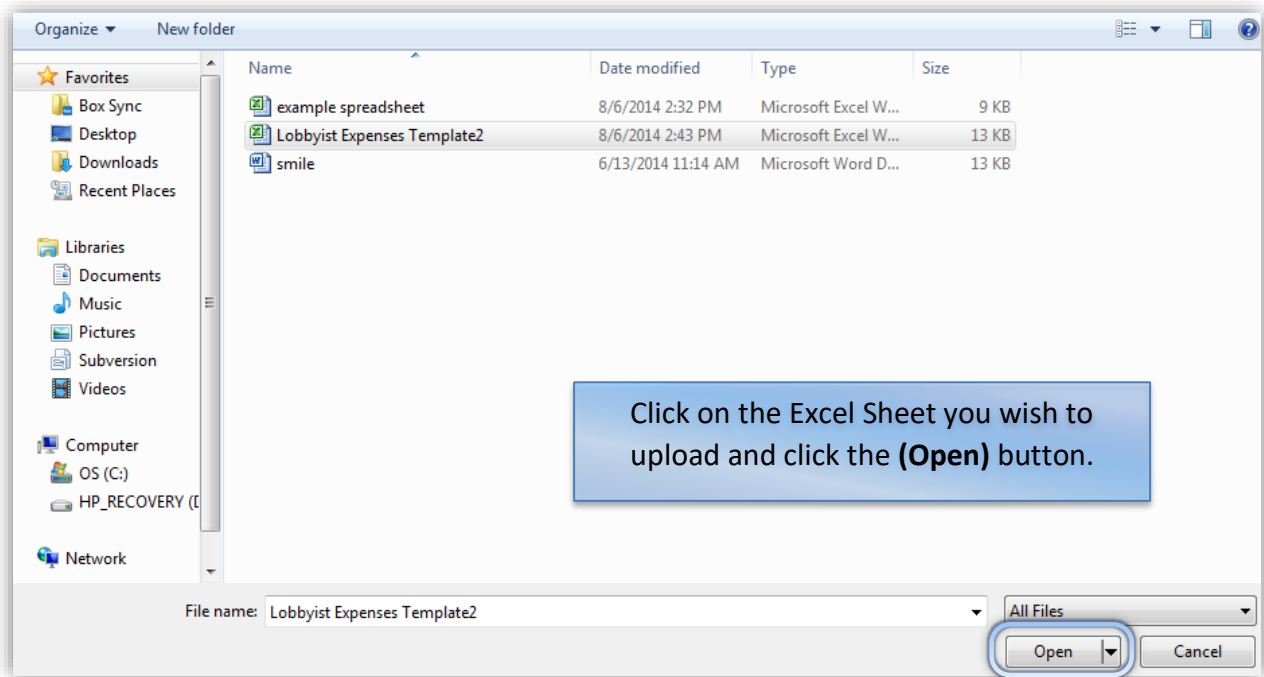
2. You may Import Expenses from a Spreadsheet by clicking on the **(Import Expenses From Spreadsheet)** button.



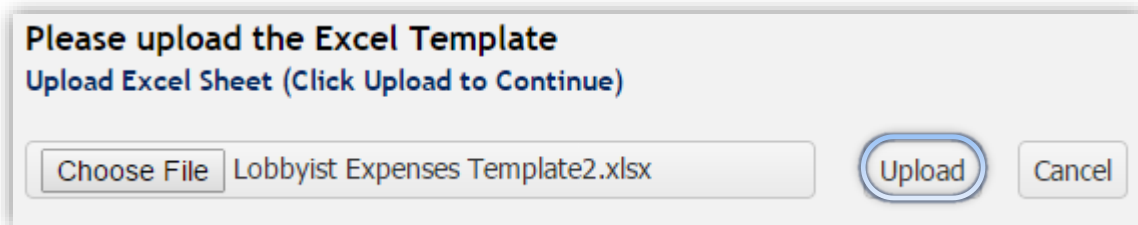
3. Next you will come to a screen where you may choose a file from your computer.



4. Click the **(Choose File)** button which will open a window where you may choose a file from your computer.



Next you should see the file you opened in the **Choose File** box and an **(Upload)** button has appeared.



5. Click the **(Upload)** button to import your Excel Sheet.
6. Next you will be brought back to the Form C – Client Annual Report screen.



Expenses Actions

Add Expenses

Import Expenses From Spreadsheet

Download Lobbyist Expense Template

Expense Items

☐ Select All

	Recipient	Recipient's Office Title	Date	Place	Provider	Expense Type
<input type="checkbox"/>	Recipient	Governor	Feb 2 2015	Place	Provider	Award

☐ Select All

Edit Expense

Remove Expense

7. If the information in an Expense item is incorrect, you may make corrections. Click the [checkbox] that corresponds with the Expense item you need to edit and click the **(Edit Expense)** button to go back to the *Lobbying Expenditure* form.
8. To delete an Expense item click the [checkbox] that corresponds with the expense item you need to delete and click the **(Remove Expense)** button.



Receptions Actions

1. Click the **(Add Receptions)** button to go to a page with a *Lobbyist Receptions* form to fill out.

Receptions Actions

Add Receptions

Reception Items

Date

Est. Number of Public Officials

City

Est. Total Attendance

State

Total Reception Cost

Establishment

Cancel Next

- Type the date into the Date box or click on the calendar button to bring up a calendar to select a date.
- Fill in the rest of the boxes
- Click the **(Next)** button when you are finished.

2. After you click the **(Next)** button you will be taken back to the Form C – Client Annual Report screen that shows your newly entered Reception Action.



Receptions Actions

Add Receptions

Reception Items

☐ Select All

	<u>Date</u>	Place/Location	Est. No. Public Officials	Est. Total At
<input checked="" type="checkbox"/>	Feb 2 2015	City MS	1200	5000

☐ Select All

Edit ReceptionsRemove Receptions

3. Once you add receptions actions you may edit them if changes need to be made, or you may delete receptions actions. Click the [checkbox] next to the date and click the **(Edit Receptions)** or **(Remove Receptions)** buttons. The **(Edit Receptions)** button will take you back to the Lobbyist Receptions page where you may change the information entered. The **(Remove Receptions)** button will delete the selected expense.

Report Actions

You may see a preview of the Annual Report by clicking the **(Preview Report)** button.

Report Actions

Preview ReportSubmit Annual Report

1. When the report is complete click the **(Submit Annual Report)** button.
2. Once the report is submitted the process cannot be reversed.



Submit Report

You are about to Submit Annual Report. This process can not be reversed.

SUBMIT

CANCEL

3. Click the **(SUBMIT)** button.

Form C

Client Annual Report submitted!!

OK

4. Click the **(OK)** button to finish and you will be directed to the *Submitted Reports* tab.

Lobbyist(s)

Pending Lobbyist

Submitted Reports

My Profile

Submitted Reports

☐ Select All

		File Number	Report Type
<input type="checkbox"/>	View/Print	LC20150021	Form C



Pending Lobbyist Tab

1. Here you may view Lobbyist Registrations that are pending approval.

Lobbyist(s)	Pending Lobbyist	Submitted Reports	My Profile
Lobbyist Registrations Pending Approval			
Certificate #		Description	
Details	L20140003	Lobbyist: Tara Lynn Kaeser ; Client: DSA Test Client 2	
Details	L20140004	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Test Client7	
Details	L20150007	Lobbyist: Tara Kaeser ; Client:Dorger Test Client 2	
Details	L20150004	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Architects, Inc.	

2. Click the Details link to approve or reject the Lobbyist Registrations.

::Lobbyist: Tara Kaeser ; Client:Dorger Test
Lobbyist Information
Lobbyist Name : Tara Kaeser
Primary
Phone :
Email :
Physical Address

On the Client Pending filings information screen, scroll all the way to the bottom of the page to see the Approve or Reject buttons.

Client Actions

3. Here you may either click the **(Approve)** button to approve the Lobbyist Registration or click the **(Reject)** button to reject it.

Submitted Reports Tab



In the Submitted Reports tab you may View, Print or Amend Reports.

Lobbyist(s)Pending LobbyistSubmitted ReportsMy Profile

Submitted Reports

☐ Select All

		File Number	Report Type	Report Status
<input type="checkbox"/>	View/Print	LC20150021	Form C	Filed - Client Report
<input type="checkbox"/>	View/Print	LC20150017	Form C	Filed - Client Report
<input type="checkbox"/>	View/Print	LC20140034	Form C	Filed - Client Report
<input type="checkbox"/>	View/Print	LC20140030	Form C	Filed - Client Report
<input type="checkbox"/>	View/Print	LC20140013	Form C	Filed - Client Report
<input checked="" type="checkbox"/>	View/Print	LC20130021Ad	Form C - Amended	Filed - Client Report
<input type="checkbox"/>	View/Print	LC20130019	Form C	Filed - Client Report
<input type="checkbox"/>	View/Print	LC20130018	Form C	Filed - Client Report

View/Print Report(s)

Amend Report(s)

- Click the [checkbox] corresponding with the report you want to use
- Once the [checkbox] is checked you may click the **(View/Print Report(s))** button to bring up a printable version of the report. You may also click the **(Amend Report(s))** button to open the report for editing.
- The [View/Print](#) link can also be click in order to bring up a printable version of the report.



My Profile Tab

The screenshot shows a web interface with four tabs: "Lobbyist(s)", "Pending Lobbyist", "Submitted Reports", and "My Profile". The "My Profile" tab is selected and highlighted in blue. Below the tabs, there is a dark blue header bar with the text "My Profile" in white. Underneath this header, there are two buttons: "View/Edit MyProfile" and "Change Password". The "View/Edit MyProfile" button is highlighted with a blue border.

- Here you may click on the **(View/Edit My Profile)** button to view and change your profile.
- You will be directed to a form where you can change your name, physical/mailling address, and contact information.



Entity Name

Name

Physical Address Information

Address 1

Address 2(eg: Suite# 201)

City

State

MISSISSIPPI ▼

Zip

☐ Mailing address same as Physical

Mailing Address Information

Address 1

Address 2(eg: Suite# 201)

City

Jackson

State

MISSISSIPPI ▼

Zip

36695-1221

Contact Information

First Name

Middle Name

Last Name

Title

Telephone 1

() - x

Fax

Email

Confirm Email

Cancel

Next

- Click the **(Next)** button when you have filled out the form.



Kind of Business of Lobbyist Client

☐ Client is an Agency of the State

President <input type="text" value="Tara L Kaeser"/>	Director 1 <input type="text"/>	Additional Business Membership: <div><div></div></div>
Vice President <input type="text"/>	Director 2 <input type="text"/>	
Secretary <input type="text"/>	Director 3 <input type="text"/>	
Treasurer <input type="text"/>	Director 4 <input type="text"/>	

- Click the **(Next)** Button to update the information.

Information Updated

Lobbyist Client information updated

- Click the **(OK)** button.



Change Password

The screenshot shows a web interface with a top navigation bar containing four tabs: 'Lobbyist(s)', 'Pending Lobbyist', 'Submitted Reports', and 'My Profile'. Below the navigation bar, the 'My Profile' section is highlighted with a dark blue header. Underneath the header, there are two buttons: 'View/Edit MyProfile' and 'Change Password'.

- When you need to change your password for any reason click the **(Change Password)** button.

The screenshot shows a 'Change Password' form. At the top, there is a warning message: 'User passwords cannot be blank. Password are case sensitive.' Below the message, there are three input fields labeled 'Old Password:', 'New Password:', and 'Confirm Password:'. At the bottom of the form, there are two buttons: 'Update' and 'Cancel'.

- Enter your old password in the top '*Old Password*' box
- Enter your new password in the middle '*New Password*' box
- Enter your new password again in the bottom '*New Password (Confirm)*' box
- Click the **(Update)** button.